Paying Your Municipal Tax Assessment

User Documentation
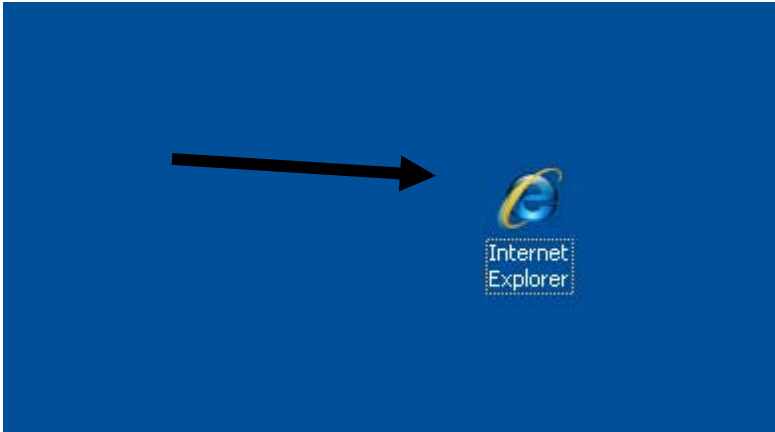
TABLE OF CONTENTS

STARTING THE APPLICATION/ESERVICES

1. To begin the E-Services application, double click on the **Explorer icon** on your desktop. The icon is shown below.

External users should proceed to the Kentucky DOI Web page at:

http://doi.ppr.ky.gov/kentucky/

2. After clicking into the above Web site, the following page should appear:

3. Click the E-Services icon in the top right corner of the Web page.

eServices
Click here

] [Directions] (800) 595-6053 | TTY (800) 462-2081

Our Mission Statement: We promote sound, competitive insurance markets; protect the public through effective enforcement and regulation; and empower the public through outreach and education.

INFORMATION
Search

Select Search Option

rd Required)

to Comply

4. Which will direct you to the DOI e-services portal, as shown below.

KYDepartment of Insurance

What does
eServices
offer?

Please log in here:
Username
Password
submit

First time here? Please click here to register for secure access.

Forgot your password?

Having trouble logging in? Click here for assistance.

Click Here to learn about our security.

Consumers
- Submit Consumer Complaint File
- View data related to ratios (i.e., Complaint, Medicare Supplement, Consumer Guides) - **
- Find information related to a licensed Insurer, Individual or Business Entity - **

**New Applicants - ** **
(Paperwork not submitted yet)**

- Access to applications, study guides, instructions and documents

Individuals
(Licensed or pending applicants)

- Review your licensing information and account profile

Business Entities
- Review your affiliated individuals licensing information (i.e., addresses, examinations, license/application status, continuing education, etc.)
- Submit requests for additional licenses, clearance / certification letters, voluntary surrenders, address changes, name changes, license renewals, and designations.**

Insurers

- Review your affiliated individuals licensing information (i.e., addresses, examinations, license/application status, continuing education, etc.)
- Renew appointments and submit payments (Instructions) - New
- Submit financial responsibility requests **

SETTING UP A NEW ACCOUNT

Before using E-Services, you'll need a username and password. **If you already have a username and password, skip to the next section.** If not, you'll need to create one. To do so, click "First Time Here."

This will enable the user to set up the account to gain access to the application.

KYOffice of Insurance

Create New eServices User Account :

Your eServices Account Information

Username	
Password	
Verify Password	
UserType	Individual: Individual Access
Security Question	Your Mother's Maiden Name
Answer	

Your Contact Information

First Name		Middle Name/Initial		Last Name	
Suffix Name		SSN			
Telephone		Extension			
E-mail Address					

Your Mailing/Shipping Information

Address Line1					
Address Line2					
City		State	Select	Zip	

For Surplus Lines Brokers

You'll need to designate your username and password….

Select a Security question with answer…

Your eServices Account Information

Username
Password
Verify Password
UserType: Individual: Individual Access
Security Question: Your Mother's Maiden Name
- Your Mother's Maiden Name
- Your Favorite Color
- Your Pet's Name
- Your Favorite Food
- Name of an Elementary School
- Last Four Digits of Your SSN
Answer

Security Question

Select a question that will be easy for you to remember the answer to. This will be used to retrieve your password should you forget it.

Here…

Note the help as you select a data entry field…

Your Contact Information

First Name   Middle Name/Initial   Last Name
Suffix Name   SSN
Telephone   Extension
E-mail Address

Your Mailing/Shipping Information

Address Line1
Address Line2
City   State: Select   Zip

Create Account

You are now ready to enter your personal data.

You must enter your SSN to verify licensing status.

Your Contact Information

First Name   Middle Name/Initial
Suffix Name   SSN
Telephone   Extension
E-mail Address

Your Mailing/Shipping Information

Address Line1
Address Line2
City   State: Select   Zip

Create Account

Once finished, click "Create Account."

Note: the City/State/ZIP must be a valid USPS match.

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You're now ready to use KOI E-Services.

IMPORTANT: If nothing happens after clicking "Create Account," please scroll to the top of the form to see if there are editing errors to consider.

After clicking "Create Account," you should be taken to the following screen.
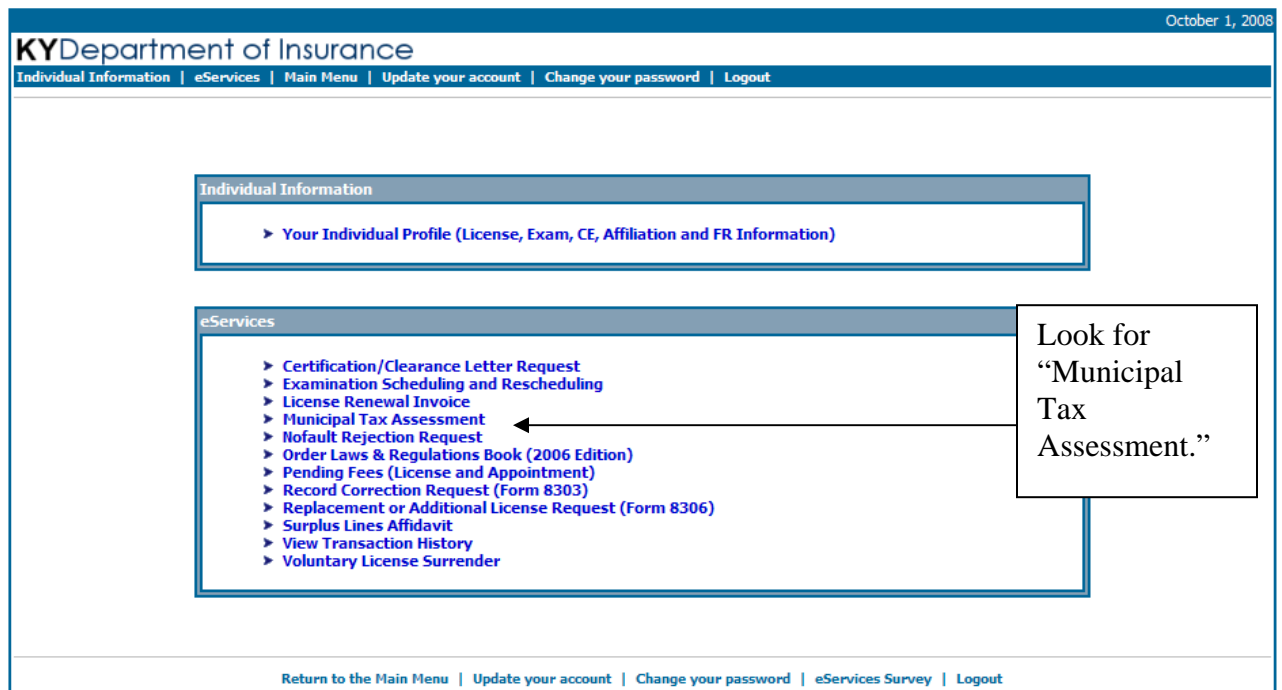
<u>For Companies</u>

To pay the assessment, the Companies will need to utilize their Annual Statement E-Services account. A mass e-mail was sent to all of these type contacts within your company including the username and password. If you did not get, or cannot find your username and password, please contact the Department via e-mail at:

KOIISHelpDesk@ky.gov

ENTERING E-SERVICES WITH YOUR USERNAME AND PASSWORD

To enter the E-Services application, after you have already established your username and password, enter your username and password in the following fields from the E-Services portal previously shown in the documentation.

The following screen should display…

KYDepartment of Insurance

Individual Information | eServices | Main Menu | Update your account | Change your password | Logout

Individual Information

▶ Your Individual Profile (License, Exam, CE, Affiliation and FR Information)

eServices

▶ Certification/Clearance Letter Request
▶ Examination Scheduling and Rescheduling
▶ License Renewal Invoice
▶ Municipal Tax Assessment
▶ Nofault Rejection Request
▶ Order Laws & Regulations Book (2006 Edition)
▶ Pending Fees (License and Appointment)
▶ Record Correction Request (Form 8303)
▶ Replacement or Additional License Request (Form 8306)
▶ Surplus Lines Affidavit
▶ View Transaction History
▶ Voluntary License Surrender

Look for "Municipal Tax Assessment."

Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

PAYING THE ASSESSMENT

Click "Municipal Tax Assessment."

Select the box next to the broker's name, and click "Submit."

Or, if this is a company payment, select the company name in the same manner…

KYDepartment of Insurance

eServices | Main Menu | Update your account | Change your password | Logout

Municipal Tax Assessment

Select	Name	Amount Paid
☐	Cincinnati Indemnity Company (The)	200

Submit

Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

After the broker clicks "Submit," the following screen will display..

KYDepartment of Insurance

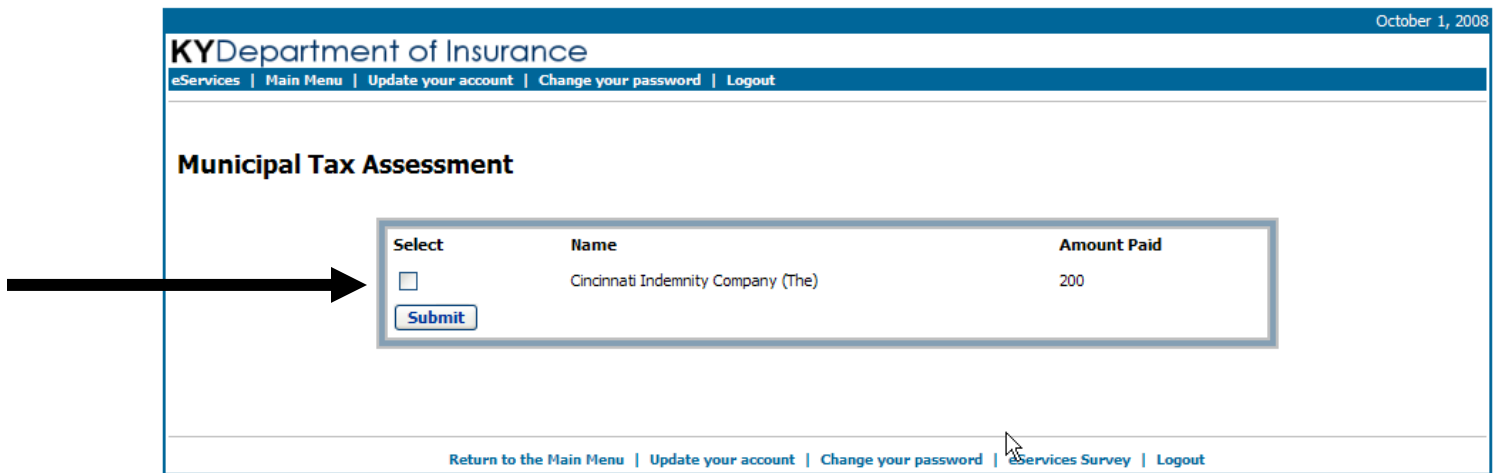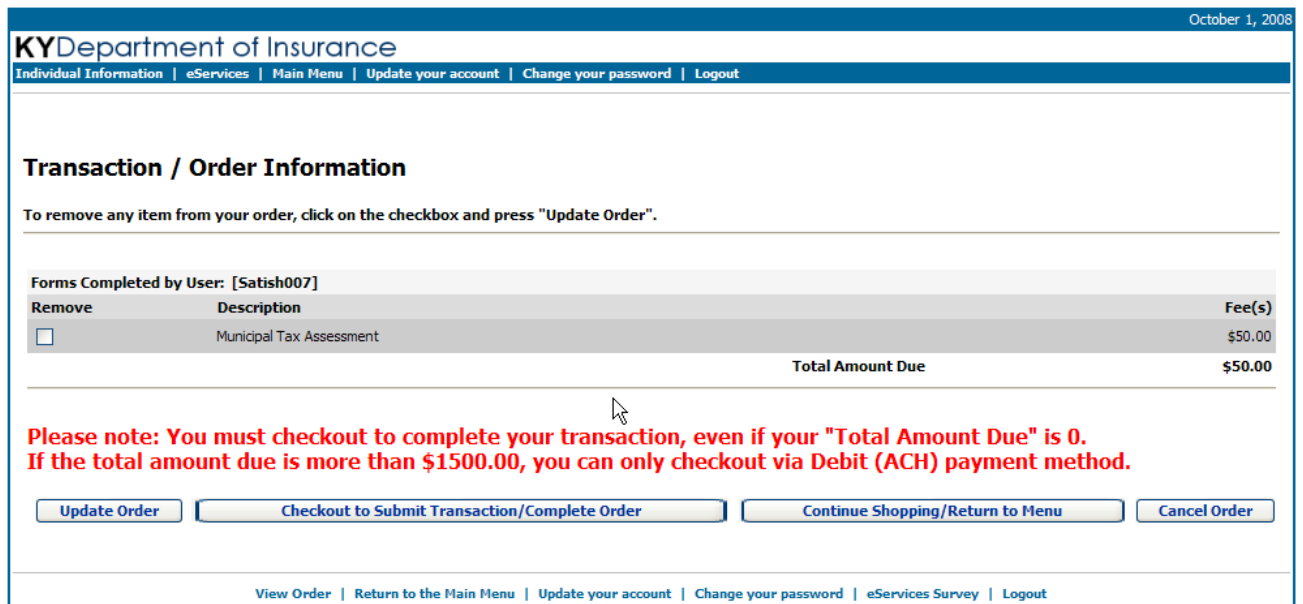Individual Information | eServices | Main Menu | Update your account | Change your password | Logout
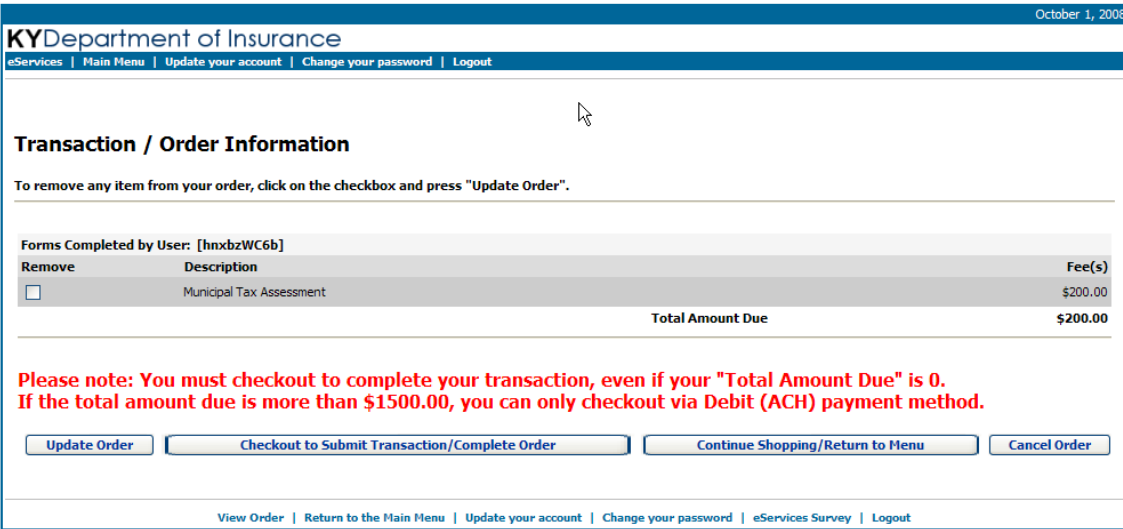
Transaction / Order Information

To remove any item from your order, click on the checkbox and press "Update Order".

Forms Completed by User: [Satish007]

Remove	Description	Fee(s)
☐	Municipal Tax Assessment	$50.00
	Total Amount Due	$50.00

Please note: You must checkout to complete your transaction, even if your "Total Amount Due" is 0.
If the total amount due is more than $1500.00, you can only checkout via Debit (ACH) payment method.

Update Order | Checkout to Submit Transaction/Complete Order | Continue Shopping/Return to Menu | Cancel Order

View Order | Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

Or the company…

Click "Checkout to Submit Transaction/Complete Order" to finalize the transaction.

You will either need to pay via Credit Card…

Checkout

You may enter either your credit card information OR your checking account information to process your order.

Total amount to be billed to your credit card: $50.00

Credit Card Information

Enter your billing information EXACTLY as it appears on your credit card and/or billing statement

Card Type:	○ Visa ○ MasterCard ○ Discover ○ American Express
Card Number:	
Expiration Date:	▼ / ▼
Name on Card:	
Billing Zip/Postal Code:	
Phone Number:(Number Only)	

Enter your credit card information here…

------- OR -------

Or via Debit…

------- OR -------

Debit Information

Enter your checking account information exactly as it appears on your check

Name on Account:

Pay to the Order of Kentucky Office Of Insurance

_____ Dollars

Memo _____ _____

⑆021001088⑆ 0011222⑈ 1234

Enter the Checking Account Name here.

Routing Number

This number is nine characters long and appears between the ⑆ symbols usually at the bottom left corner of your check.

Account Number

This number is 5-17 characters long and appears next to the ⑈ symbol at the bottom of your check and usually to the right of your bank routing number.
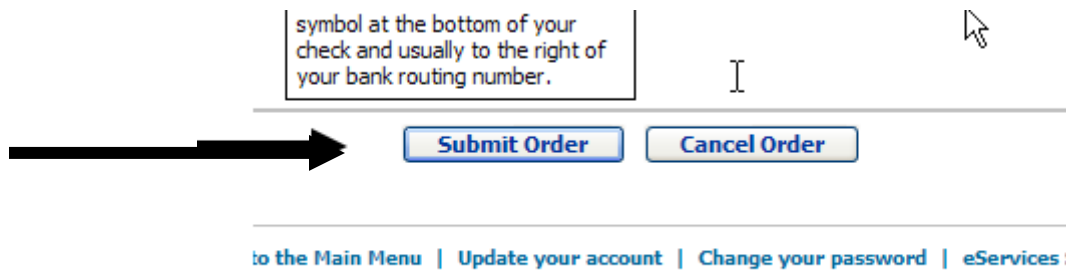
Then the routing number, along with the account number here…

Submit Order   Cancel Order

View Order | Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

After completing either, click "Submit Order" to proceed.

You will get a final transaction screen to show the completion of your order….

You can also print a copy of your invoice…

You have now completed the payment of the assessment.

KYDepartment of Insurance

Individual Information | eServices | Main Menu | Update your account | Change your password | **Logout**
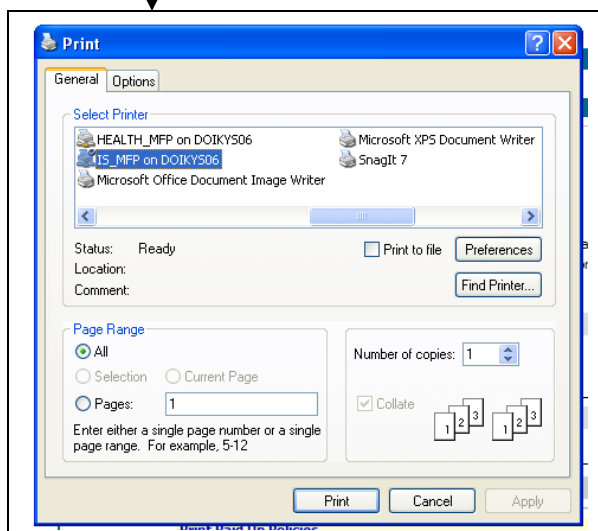
Transaction Details

Click here…to log out of
your E-Services session.

Entity / User Details

DOI Number

User Last Name

User First Name
Robert

Transaction Status: Complete

Order Information	Shipping Information (if applicable)

DOI Transaction ID: 13
ePay Transaction ID: 457
Transaction Date: 10/01/2008

Qty	Description	Fee(s)
1	Municipal Tax Assessment	$50.00
	Total Charged:	$50.00

Print copy of invoice | Click here to return to the main menu

VIEWING TRANSACTION HISTORY

You may return to the application to review previously completed transactions.

To do so, enter the E-Services application as described previously….

First, log into E-Services…

The following screen should display…

KYDepartment of Insurance

Individual Information | eServices | Main Menu | Update your account | Change your password | Logout
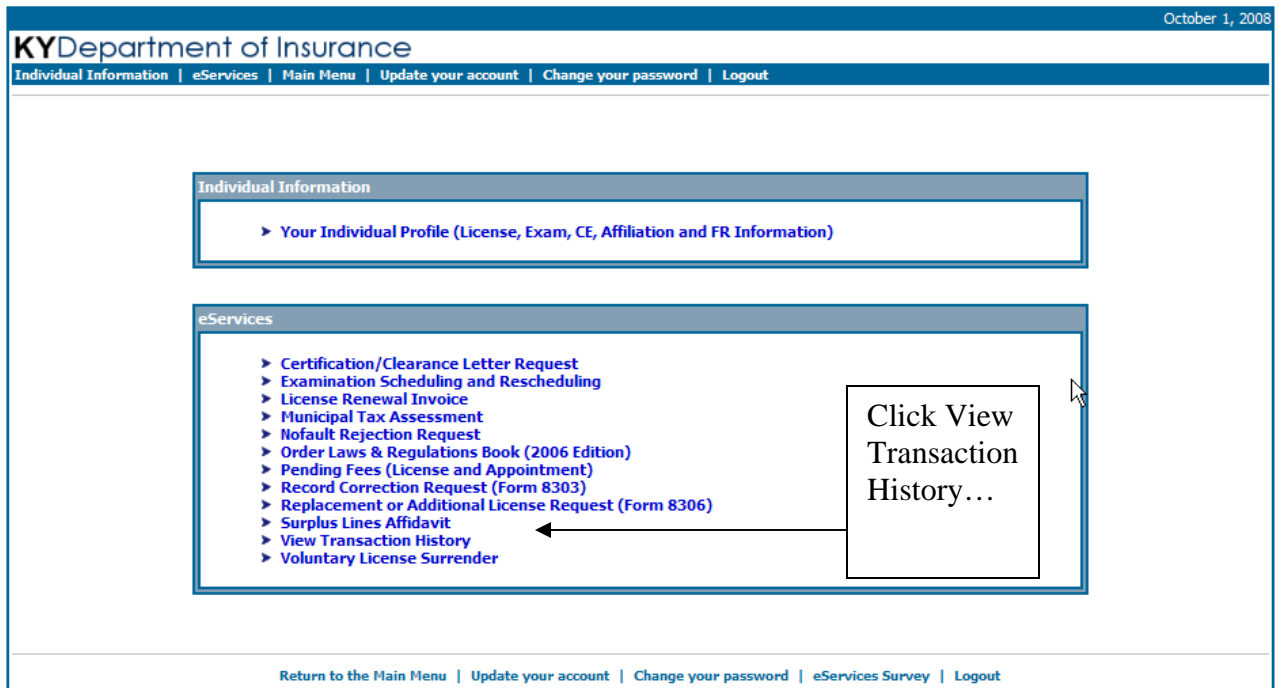
Transaction History

Entity / User Details		
DOI Number	**Individual / Entity Name**	
User Last Name	**User Middle Name**	**User First Name**

To view 30 days of transactions during a certain period, Enter the start date.

Enter Start Date [_____] 🗓 [**Display Transactions**]

The last 30 days of transactions will automatically display

Below is a list of all your transactions within the last 30 days. You must re-submit any transactions that are listed as incomplete.

Transaction ID	ePay Trans ID	Transaction Date	Transaction Total	Transaction Status
139	457	10/01/2008	50	Complete

Click on the Transaction ID to view the details of the Transaction.

Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

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You can also search further back than this, by utilizing the tool shown here.

Click here..

To display the calendar. This will allow you to enter a new begin date to search by, which will set the search parameter from the begin date, to current.

After the date has been set, click "Display Transactions" to list the result in the grid, as shown below.

To review a record displayed in the grid, click the Transaction ID.

Which will display the following screen.

To display the details of the transaction.

Transaction Details

Entity / User Details		
DOI Number	Individual / Entity Name	
User Last Name	User Middle Name	User First Name

Transaction Status: Complete

Order Information	Shipping Information (if applicable)
DOI Transaction ID: 1 ePay Transaction ID: 45 Transaction Date: 10/01/2008	

Qty	Description	Fee(s)
1	Municipal Tax Assessment	$50.00
	Total Charged:	$50.00

Print copy of invoice | Click here to return to the main menu

Return to the Main Menu | Update your account | Change your password | eServices Survey | Logout

Log out of the system here.